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Foreign Crops and MARKETS

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BANANA EXPORTS (Page 77)

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LATE NEWS

Because Cuba's growers cannot supply increased domestic demand, the country's Ministry of Agriculture on July 15, 1948 issued a resolution authorizing importation of United States grapefruit except that grown or packed in Louisiana and Texas. The resolution provides that the fruit must be packed in crates or wooden cases but need not be wrapped individually in paper.

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Meadows and pastures in France were reported as developing favorably, as did most cultivated crops. Although cool rainy weather prevailed in June, the prospects in early July were for a satisfactory growing season provided there is sufficient dry warm weather to mature crops. During the month milk production showed seasonal increases and meat supplies were somewhat easier.

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The Dominican Republic by Executive Decree dated July 9, 1948 prohibits importation of cattle and certain products of Mexican origin.

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Denmark's second official crop condition figures in percent of normal as of July 15 and comparable 1947 data are as follows: pastures 63, 55; meadow hay 74, 64; field hay 54, 32; alfalfa 94, 72; fodder beets 96,81; sugar beets for feed 97, 82; and root crops over 90 and slightly higher than 1947.

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Weather in the Netherlands during the last half of June and first half of July was unusually cold. June rainfall was above normal, averaging 79 millimeters (3.1 inches) against 55 millimeters (2.2 inches) for the

(Continued on Page 93)

BANANA EXPORTS UP 20 PERCENT

Banana exports in 1947 from the principal banana exporting countries are estimated to be 81,484,000 count bunches of 50 pounds, 20 percent above the estimated 1946 exports of 67,938,000 but 25 percent below the prewar average of 109,312,000.

The Western Hemisphere during 1947, produced an average of 89 percent of all bananas entering international trade, while Europe, Asia, Africa, and Oceania accounted for the remaining 11 percent. This compares with 83 and 17 percent respectively in 1937 which was the banner year for world banana exports. Between 1937 and 1944 exports declined because of Sigatoka disease and wartime interruptions.

The 1948 banana production in Guatemala will probably exceed 15 million bunches. This means production has tripled during the past 20 years. During the 1920's an average of 5 million bunches were exported, during the 1930's production rose to an average of 7 million and in 1939 a peak of 10 million was reached. The worst year was 1943 when shipping was disrupted and exports dropped to 2.5 million bunches. At the end of the war, exports rose rapidly and in 1945 reached 8.5 million, in 1946 9.8 million and in 1947, 14.9 million.

Honduras banana exports for 1947, estimated at 15.2 million bunches are 7 percent above the 1946 exports of 14.2 million and 23 percent more than were exported during the 5-year (1934-38) average of 12.4 million. The banana industry in Honduras has continued the steady improvement begun in 1944 after weathering the wartime shipping crisis when exports dropped to 6 million bunches.

Exports from Mexico of 5.6 million bunches during 1947 is about 500,000 more than during 1946 but about one-half as many as during prewar years. Decrease in production is the result of Sigatoka disease, weather conditions and inadequate transportation. Nearly all of Mexico's bananas come to the United States. Exports of bananas from the Republic of Panama declined to 6.4 million bunches in 1947 from 7.3 million exported in 1946 and a prewar average of 8.0 million. A severe rain and wind storm in the Chiriqui province in August 1947 resulted in the loss of about 4 million bunches and damaged about 75 percent of the young plants. As a result banana shipments will not return to normal until about the middle of 1948 when production may reach 7 million bunches.

In Jamaica, exports reached 4.0 million bunches 5 percent less than the 4.2 million exported during 1946; because of prolonged summer drought and spread of Panama disease, shipments during 1947 did not reach the goal of 4.2 million bunches. Bananas continue to be sold to the British Ministry of Food at about $130 a ton by an agreement expiring in 1949, but the British have offered to extend bulk purchasing for an additional 5 years. Research in control of leaf spot and Panama disease and the search for a new variety to replace the "Gros Michel" are being pushed under grants from the British.

Haitian exports during 1947 estimated at 4.4 million bunches are 24 percent higher than the 3.5 million exported during 1946.

(Text Continued on Page 81; table follows)

Bananas: International trade, average 1934-38, annual 1940-47.

Continent and country	Average 1934-38	1940	1941	1942	1943	1944	1945	1946	1947 1/
	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches
	Exports from specified exporting countries								
North America									
British Honduras	612	437	337	97	42	195	145	85	162
Costa Rica	4,217	3,155	4,835	2,267	2,386	1,884	2,479	4,920	6,103
Guatemala	7,370	8,306	6,955	5,019	2,546	4,919	8,547	9,758	14,884
Honduras	2/ 12,353	14,547	12,865	6,514	6,146	10,404	13,138	14,184	15,211
Mexico	12,230	5,907	3,977	3,548	4,830	3,981	3,502	5,039	5,645
Nicaragua	2,168	1,040	585	58	0	7	73	188	200
Panama, Republic of	8,027	8,211	7,937	3,324	1,323	1,624	3,601	3/ 7,268	3/ 6,384
Panama, Canal Zone	1,541	1,746	1,676	555	0	5	4	4/	4/
Caribbean:									
Cuba	5,316	3,874	3,335	1.916	1,316	1,083	1,162	1,952	1,936
Dominica	57	38	49	12	3	4	4	4	4
Dominican Republic	88	630	835	620	611	377	971	1,221	930
Grenada	65	59	49	14	9	8	3	5	5
Guadeloupe	1,553	1,009	325	100	138	112	462	838	1,000
Haiti 5/	489	1,361	1,970	1,159	362	1,734	2,409	3,528	4,381
Jamaica	14,824	4,794	3,912	943	202	782	1,258	4,194	3,957
Martinique	1,192	463	103	0	1	5	0	144	596
St. Lucia	56	48	40	2	6/	0	0	0	0
St. Vincent	22	21	14	1	0	0	0	0	0
Trinidad and Tobago	71	25	9	0	0	0	6/	2	2
Total North America	72,251	55,671	49,808	26,149	19,915	27,124	37,758	53,330	61,400
Europe									
Spain	7/ 7	46	23	105	180	139	200	261	275
Asia									
Syria and Lebanon	4	63	4	6/	0	6/	11	15	15
Japan 8/	186	250	159	58	66	0	0	0	0
Formosa 9/	5,378	4,692	3,200	1,890	996	529	0	0	0
Formosa	704	668	576	231	0	0	0	173	412
Netherland Indies:									
Java and Madeira	88	106	86	0	0	0	0	0	0
Outer Provinces	38	52	0	0	0	0	0	0	0
Total Asia	6,398	5,831	4,025	2,179	1,062	529	11	188	427
South America									
Brazil	8,714	7,064	4,048	2,444	1,824	2,243	2,587	4,184	5,927
Colombia	7,122	5,652	3,400	296	1	532	1,316	1,820	2,000
Ecuador	2,100	2,024	1,467	968	677	595	763	1,500	2,979
Surinam	3	0	0	0	0	0	0	0	0
Venezuela	105	96	87	206	344	206	0	0	0
Total South America	18,044	14,836	9,002	3,914	2,846	3,576	4,666	7,504	10,906

Bananas: International trade 1934-38, annual 1940-47.

Continent and country	Average 1934-38	1940	1941	1942	1943	1944	1945	1946	1947 1/
	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches
Africa									
Algeria	5	2	0	0	0	0	0	0	0
Belgian Congo	58	40	35	35	40	40	51	78	88
Canary Islands	5,730	4,460	4,530	3,430	2,995	2,280	2,797	4,027	4,000
Egypt	17	1	0	0	0	5	6	10	10
Eritrea	885	691	0	0	0	0	0	0	0
French Cameroon	719	748	0	0	0	0	0	207	883
French West Africa:									
French Guinea	1,778	1,016	449	57	44	35	16	252	1,170
Ivory Coast	295	282	116	6/	0	0	0	75	285
Gold Coast	33	54	5	6/	6/	1	6/	6/	6/
Mozambique	443	436	793	979	1,199	951	1,086	1,100	1,100
Nigeria and Cameroon	1,982	2,627	0	2	2	1	1	386	400
Sao Tome and Principe	7/ 9	8	5	5	7	7	18	20	20
Union of South Africa	5	5	12	19	0	11	7	10	10
Total Africa	11,959	10,370	5,945	4,527	4,287	3,331	3,982	6,165	7,966
Oceania									
Fiji	286	181	95	183	154	74	140	230	250
Hawaii 10/	98	105	90	0	0	0	0	0	0
Tonga Islands	31	42	78	81	63	48	52	60	60
Western Samoa	238	370	291	131	105	53	180	200	200
Total Oceania	653	698	554	395	322	175	372	490	510
World total	109,312	87,452	69,357	37,269	28,612	34,874	46,989	67,938	81,484
	Imports into specified importing countries 11/								
North America									
Canada	2,488	2,283	2,485	756	840	2,113	3,647	4,856	3,806
United States 12/	59,498	52,957	50,713	23,363	20,745	27,244	36,862	46,626	54,176
Total North America	61,986	55,240	53,198	24,119	21,585	29,357	40,509	51,482	57,982
Europe									
Belgium	986	114	0	1	0	0	4	4	4
Denmark	161	22	0	0	0	0	10	2	6/
Eire	247	135	0	0	3	0	0	39	169
Finland	110	0	0	0	0	0	6/	6/	6/
France	7,522	2,450	774	27	6/	17	3	1,102	3,772
Germany	5,281	20	45	11	0	0	0	0	0
Italy	845	691	0	0	0	-	-	1	9
Netherlands	1,367	72	6/	6/	0	-	-	37	76
Norway	322	34	0	0	0	0	54	184	135
Spain	7/ 2,275	4,414	4,505	3,449	2,796	2,117	2,336	1,521	2,000
Sweden	439	62	0	0	0	1	83	956	580
Switzerland	291	145	24	104	163	100	164	324	334
United Kingdom	13,071	8,531	4	0	0	0	50	4,549	4,649
Total Europe	32,917	16,690	5,352	3,592	2,962	2,235	2,704	8,719	11,728

Bananas: International trade, average 1934-38, annual 1940-47.

Continent and country	Average 1934-38	1940	1941	1942	1943	1944	1945	1946	1947 1/
	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches
Asia									
Iraq	12	10	4	0	6/	6/	6/	0	0
Japan 13/	5,378	4,692	3,200	1,890	996	529	0	0	0
Korea 9/	186	250	159	58	66	0	0	0	0
Palestine	0	51	13	41	67	92	110	170	200
Total Asia	5,576	5,003	3,376	1,989	1,129	621	110	170	200
South America									
Argentina	6,394	7,319	4,309	2,575	1,594	1,954	2,108	3,169	4,540
Chile	584	890	768	653	426	648	651	849	1,129
Uruguay	450	1,023	632	523	478	400	417	400	400
Total South America	7,428	9,232	5,709	3,751	2,498	3,002	3,176	4,418	6,069
Africa									
Algeria	233	158	8	6/	0	0	0	0	0
South West Africa	4	4	4	6	7	10	6	10	10
Spanish Morocco	16	26	29	9	14	24	28	30	30
Total Africa	253	188	41	15	21	34	34	40	40
Oceania									
Australia	72	69	30	6/	0	0	0	0	0
New Zealand	505	599	471	483	359	222	368	494	450
Total Oceania	577	668	501	483	359	222	368	494	450
Other countries 14/	411	55	0	0	0	0	0	173	412
World total	109,148	87,076	68,177	33,949	28,554	35,471	46,901	65,496	76,881

1/ Preliminary. 2/ Crop years Aug.1-July 31, 1933-34 through 1936-37; Aug.1-June 30, 1937-38; July 1-June 30, 1939; subsequent years are calendar. 3/ Includes Panama Canal Zone. 4/ Included in Panama Republic. 5/ Year beginning Oct.1. 6/ Less than 500 bunches. 7/ Less than 5 years. 8/ Trade with Korea. 9/ Trade with Japan. 10/Shipments to United States. 11/ Reexports have been deducted. 12/ Includes shipments from Hawaii. 13/ Trade with Formosa. 14/ Includes the following: 1934-38; Austria 43, Czechoslovakia 125, Hungary and Esthonia each 2, Latvia and Lithuania each 5; Malta 18, Tangier 10, French Morocco 92, Tunisia 109. 1940; Malta 1, French Morocco 24, Tunisia 30, 1946; China 173. 1947; China 412.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research and other information. All figures have been converted to count bunches of 50 lbs.

Banana exports from Cuba in 1947 amounted to 1,936,000 bunches, a little less than the 1946 export and about a third as large as prewar. Stems are light weight and production is suffering from Panama and Sigatoka diseases. Exports for 1948 are forecast at less than 1947 because of disease and keen competition from Central and South American countries.

In the Dominican Republic the 1947 production of about 7 million bunches is about half of the 1946 crop. Acreage of bananas was decreased because of the planting of tobacco, but if low tobacco prices continue, banana production may rise in 1948. Exports in 1947 amounted to 930,000 bunches compared with 1,221,000 in 1946 and 88,000 prewar.

Exports from Brazil in 1947 are indicated to be 5.9 million bunches. Of which Argentina took about 78 percent and Uruguay 15. Only between 3 and 5 percent of the entire crop is exported.

Colombia's exports for 1947, estimated at 2 million bunches, is about equal to the 1946 exports but only a third as large as prewar. Sigatoka is rapidly destroying the plantations of the independent growers. The Sevilla Fruit Company, largest commercial operator, is serviced by permanent spraying facilities.

Banana exports from Ecuador for 1947 amounted to 2,979,000 bunches, about double the 1946 export.

Exports from Africa amounted to 8.0 million bunches, 29 percent above the 1946 exports of 6.2 million and 33 percent below the prewar average of 12.0 million. The Canary Islands shipped 50 percent of the total 1947 African exports. This compares with 4 million shipped in 1946, mostly to European countries, and to the prewar average of 5.7 million. French West Africa and Mozambique each exported a little more than 1 million bunches in 1947. Oceania exports amounted to half a million bunches in 1947, about the same as 1946 and a little less than prewar.

IMPORTING COUNTRIES:

The United States continued to be the world's largest importer of bananas in 1947, taking about 54.2 million count bunches. The United Kingdom was the second largest, importing 4.6 million, Argentina 4.5 million and France and Canada 3.8 million each.

Chief suppliers of United States bananas for 1947 were Honduras 13.7 million, Guatemala 11.7 Mexico 4.6 Costa Rica 5.6, Republic of Panama 4.8, Haiti 4.2 and Cuba, Columbia and Ecuador about 2 million each, the Canal Zone and the Dominican Republic 1 million each.

Canada's import of 3.8 million bunches is 22 percent below the 1946 import of 4.9 million and 53 percent above the prewar average of 2.5 million.

Imports into principal European countries amounted to 11.7 million bunches, 3 million more than in 1946 and about one-third as many as during prewar.

Argentina, Chile and Uruguay imported 6.1 million bunches in 1947, as compared with 4.4 million in 1946 and 7.4 million prewar.

This is the first published estimate of world banana trade by the Office of Foreign Agricultural Relations.

COMMODITY DEVELOPMENTS

TROPICAL PRODUCTS

HAITI'S COFFEE PROSPECTS FAVORABLE; EXPORT CLASSIFICATION REVISED

The 1948-49 coffee crop prospects in Haiti are favorable and a preliminary survey indicates the crop will be equal at least to the previous one. Final figures are not available for the 1947-48 exportable production, but it now is estimated at 350,000 to 400,000 bags, according to reports from the American Embassy at Port-au-Prince.

About 10,000 bags of high-grade coffee were carried over from the 1947-48 crop, and about 30,000 bags of "triage", the lowest grade, have accumulated over the past few years. Haitian coffee exporters have petitioned the Government to reduce the export duties on coffee from $6.50 to $3.25 per bag of 176 pounds. If this were done, exporters probably could sell the "triage" coffee in Europe, or possibly remove the black beans from it, which would permit its export to the United States.

Haitian coffees are classed as "milds". Before World War II, they found a ready market in Europe, but the postwar shortage of dollar exchange has curtailed European purchases to a considerable extent. During and since the war, the United States has been the principal buyer, particularly of washed coffee. Only about 17 percent of Haiti's coffee is washed; the remainder is classed as "natural," or unwashed, coffee. European countries prefer the natural coffees. The Haitian Government desires not only to regain its European coffee outlets, but also to maintain its place in the United States market. With these ends in view, Article I of the decree law of August 19, 1943, was recently revised, providing new export classes for Haitian coffees.

In Haiti, coffees declared for export are graded according to the size of the beans, rather than by cup test. The percentage by weight of the various sizes of beans in a representative sample determines the class.

ECUADOR'S 1947-48 CACAO CROP REDUCED

Unfavorable weather in Ecuador has resulted in a smaller cacao harvest than was formerly forecast according to a report from the American Consulate General in Guayaquil. The 1947-48 crop (October 1 - September 30), now estimated at 32.4 million pounds, compares with 35.0 in 1946-47 and 37.3 million pounds in 1945-46. Heavy rains in April and May and generally cloudy damp weather during these months, particularly in Los Rios Province where about 60 percent of the cacao is grown, largely account for the smaller current harvest. The diseases, Witches'- broom and monilia pod rot, both of which are widespread in Ecuador's cacao plantations, are much more destructive during periods of wet weather.

. . . . .

COTTON AND OTHER FIBER

KAPOK PRODUCTION INCREASES IN FRENCH INDOCHINA

The 1947 crop of kapok in French Indochina is officially estimated at 3.3 million pounds with a forecast of possibly close to 4.5 million pounds for 1948. Even if the season continues favorable, the crop would be only about 68 percent of average annual exports from 1935 through 1939.

Most of the 1948 crop reaching Saigon will continue to be from Cambodia because lack of security will probably prevent the Cochin-china crop from reaching the market.

Domestic consumption of kapok is estimated at less than 500,000 pounds annually. It is used mostly by small businesses in making pillows, mattresses, and blankets.

Exports of kapok in 1947 were only 3.5 million pounds compared with 4.6 million in 1946 and more than 7.7 million in 1938, the peak prewar year. The quality of the kapok exported through Saigon cannot compete favorably with that of Java kapok, and the export market for the former will probably remain satisfactory only until Java kapok comes into the market in sufficient quantity to give competition.

In 1947 more than half of the ginned kapok and about 30 percent of the unginned were exported to France. Belgium and the Netherlands together accounted for 30 percent of the ginned and 66 percent of the unginned. All the waste kapok and a small amount of the ginned were exported to Singapore.

EIRE FLAX ACREAGE EXPECTED TO INCREASE

The Eire Department of Agriculture announced that an increase in flax acreage of possibly as much as 40 percent over 1947 was expected for 1948 as a result of a substantial rise in the price guaranteed to growers.

A total of 17,800 acres was planted to flax in Eire in 1947 and an early estimate of the crop was about 5.6 million pounds of scutched line fiber and 2.2 million pounds of tow. The 1947 crop was considerably lower than the 8.5 million pounds of line fiber and 4.4 million pounds of tow that were obtained in 1946 from an area of 26,300 acres. The late spring followed by excessive rain at the planting season was a big factor in the reduction in flax area.

Yield was variable. An average of between 420 and 490 pounds per acre was obtained in County Cork, about 420 pounds in County Mayo and between 252 and 350 pounds in the northern counties.

The British Ministry of Supply has contracted again this year to purchase the entire crop at guaranteed prices. The price scale for 1948 is increased over that for 1947 by 8 shillings 9 pence per stone, or the equivalent of about 12.56 cents per pound. The 1948 price ranges from the equivalent of 58.15 cents per pound for grade 1 to 47.38 cents for grade 6, with 2.15 cents per pound more for each grade of turbine-scutched flax. Prices for dam-retted tow remain at from $201.00 to $301.50 per long ton (of 2,240 pounds) for the 3 grades of tow, the same price as in 1947.

Exports of flax from Eire follow in the aggregate much the same year-to-year pattern as production.

Eire: Flax exports for 1947 and the first quarter of 1948 with comparisons

Years and months	Line Fiber		Tow	
	Quantity	Value	Quantity	Value
Calendar years	1,000 pounds	1,000 dollars	1,000 pounds	1,000 dollars
1946	10,759	3,831	5,630	760
1947	7,575	2,518	4,345	561
Jan.-Mar.				
1947	3,507	1,074	1,170	152
1948	2,189	856	1,025	125

Office of Foreign Agricultural Relations. Compiled from Eire foreign trade statistics.

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FRUITS, VEGETABLES AND NUTS

CUBAN AVOCADOS SHIPPED BY AIR

The first shipment of the season of Cuban avocados began June 15 and for the month of June amounted to 876,000 pounds compared with an average of 878,000 pounds shipped during June in the 3 years 1939-41. A large proportion, 73 percent, was flown to Florida and then transshipped: the remainder was sent by refrigerated ships or by car ferry. Because of reduced spoilage, shippers find that air shipment is well worth while and expect to ship as much as possible by air during the rest of the season.

AVOCADOS: Exports from Cuba to United States, average 1939-41, annual 1947 and 1948

Month	Average 1939-41	1947	1948
	1,000 pounds	1,000 pounds	1,000 pounds
June	878	216	876
July	3,607	2,394	[1] 2,700
August	3,757	2,125	[1] 2,700
September	[2]	860	[1] 1,000

[1] Forecast. [2] Unavailable.

AUSTRALIA'S CANNED FRUIT PACK LARGE

Canned fruit production for 1948 in Australia is now estimated at 2,952,000 cases (2 doz. 30-ounce cans), 12 per cent above the 2,625,000 produced during 1947 and the largest pack since 1938 when 3,031,000 cases were packed. The large pack in 1948 is a result of large crops of apricots, peaches and pears and new and better machinery for processing the fruit. More than half the 1948 pack will go the United Kingdom but a considerable quantity has been offered to Canada.

FRANCE'S PRODUCTION OF CANDIED CHERRIES INCREASING

France's production of candied cherries for export in 1948 will probably be more than the 2,736 short tons exported during 1947. Before the war, the French candied cherry industry was mainly for export. This industry ceased during the war years but was resumed in 1946.

Special provisions have been made to permit manufacturers to obtain sugar for products intended for export, and in 1947 exports reached 50 percent of the prewar level. Allocations of sugar are made by the Food Administration to the confectionery industry as a whole. Supplies are then sub-allocated among producers on the basis of their consumption for the period 1937-39. All manufacturers of candied cherries receive a quota of sugar for use in any confectionery product but not specifically for candied cherries. The United Kingdom is the largest customer for French candied cherries, used in making fruit cake. In 1938, out of 4,800 short tons exported, the United Kingdom took 3,800 tons.

GRAIN, GRAIN PRODUCTS AND FEEDS

CANADIAN GRAIN ACREAGE ABOUT THE SAME AS IN 1947

Canada's total grain acreage for 1948 shows virtually no change from the 1947 total, according to the preliminary estimate of the Dominion Bureau of Statistics. Wheat acreage, placed at 24.1 million acres is only slightly smaller than the 1948 area of 24.3 million acres, whereas earlier indications had pointed to a significant reduction.

The oats acreage, estimated at 11.1 million acres, is fractionally above last year's total. Increased acreage in Manitoba and Ontario more than compensates for reductions reported for all other Provinces. Barley acreage, at 6.5 million acres, is about 12 percent below the 1947 figure. Reductions are reported for all Provinces except Ontario and British Columbia.

Rye, in contrast, shows an expansion of more than 75 percent, with the current acreage set at 2 million acres. Increased rye acreage in Saskatchewan accounts for about 60 percent of the increase, with some shift from barley to rye acreage indicated for that Province. The bulk of the remaining increase was reported for Alberta and Manitoba. Seedings of mixed grains increased about 20 percent, mainly in Ontario, with smaller increases shows for Quebec and Alberta.

The figures quoted are based on the annual June survey of field crops and are preliminary estimates, subject to revision. In addition to grain crops, alfalfa acreage shows a slight increase. This is more than balanced, however, by a decline in the acreage in hay and clover. The acreage in summer-fallow shows little change from the 1947 level.

Canada: Seeded acreage of principal grain crops and summer-fallow in the Prairie Provinces, 1948 with comparisons.

Province	Wheat	Oats	Barley	Rye	Summer-fallow
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres
Manitoba					
1948 a/	2,397	1,491	1,540	115	2,056
1947	2,497	1,381	1,901	40	2,187
1948 as percent of 1947	96	108	81	288	94
Saskatchewan					
1948 a/	14,389	3,772	2,316	1,238	11,154
1947	14,226	3,983	2,780	704	11,480
1948 as percent of 1947	101	95	83	176	97
Alberta					
1948 a/	6,259	2,373	2,226	612	6,199
1947	6,634	2,534	2,354	328	5,773
1948 as percent of: 1947	94	94	95	187	107
Prairie Provinces					
1948 a/	23,045	7,636	6,093	1,965	19,409
1947	23,357	7,898	7,035	1,072	19,440
1948 as percent of 1947	99	97	86	183	100

a/ Preliminary estimates.
From reports of the Dominion Bureau of Statistics.

UNITED KINGDOM ENDS BREAD RATIONING

The Ministry of Food of the United Kingdom has announced the ending on July 25 of bread rationing and restrictions on serving bread in restaurants, approximately 2 years after the inauguration of bread rationing (July 21, 1946).

The measure ending actual rationing carries provisions for restricting use, and no increase in the average consumption is expected. To that end the extraction rate is to remain at the comparatively high present rate of 85 percent, until the end of June 1949.

Farmers are to be allowed to retain up to 20 percent of their millable wheat from the 1948 harvest for their own use. Since the price of wheat is unfavorable for feeding, compared with rationed feedstuffs, however, it is believed that farm retention may be substantially below that percentage. Sales from the producer to other livestock feeders are not permitted.

The end of rationing became possible because of the generally favorable world grain outlook, which includes a large crop in the United Kingdom (See Foreign Crops and Markets July 26, 1948).

FATS AND OILS

CANADIAN FLAXSEED ACREAGE EXCEEDS EARLIER INDICATIONS

Canadian farmers have planted 1,938,000 acres to flaxseed, according to the first official forecast for 1948, 14 percent larger than indicated earlier this year. The corresponding figure for last year was 1,438,000 and the final estimate, 1,571,000 acres providing a harvest of 12,241,000 bushels. This is Canada's third largest flaxseed acreage, being exceeded only in 1912 and in 1943.

The condition of the crop for all Canada on June 30 indicated a yield of only 83 percent of the long-time average of 8 bushels per acre. On this basis, 1948 production may not exceed 13,000,000 bushels. Later reports, however, indicate that conditions have improved, especially for late-sown flaxseed. In Manitoba, where the area is almost double that of 1947, the crop is reported to be developing satisfactorily.

The Canadian Wheat Board's support price for top grades of 1948-49 flaxseed (effective August 1) is $4.00 per bushel, basis delivery Montreal or in store at Fort William/Port Arthur. The ceiling price of $5.50 per bushel that applied to 1947-48 production was removed on August 1, 1948, thus permitting free trading at prices above the support level.

With ample stocks on hand and prospects of a large flaxseed harvest domestic requirements are practically assured, and a substantial quantity of flaxseed may be available for export during the coming crop year. Export restrictions were partially removed on April 21, 1948, and on May 28 the Canadian Wheat Board authorized the sale of flaxseed for export without regard to International Emergency Food Committee allocations provided that both purchases and sales be reported to the Fats and Oils Committee of the IEFC at Washington.

During August-June (1947-48) western Canadian farmers had marketed 10,017,000 bushels of the 13,018,000 (777,000 carry-over and 12,241,000 new crops) on hand at the beginning of the season. Of this quantity 1,141,000 bushels of seed and 17,245,000 pounds of linseed oil (total as flaxseed 2,046,000 bushels) had been exported by the end of May 1948. Crushings during this period have not been reported. It is assumed, however, that they were on a comparatively large scale as they have increased steadily in the last decade.

Canadian linseed oil exports in the calendar year 1948 may surpass the record of 26,265,000 pounds in 1944. During January-May 15,495,000 pounds were exported compared with 12,385,000 in 1947 (12 months) and the 1935-39 average of 124,000 pounds. As is the practice in most flaxseed producing countries, Canada prefers to crush the seed and export surplus linseed oil. Flaxseed exports totaled 1,046,000 bushels during the first five months of 1948.

CANADA: Exports of linseed oil and flaxseed, 1948 with comparisons.

Country of destination	Linseed Oil			Flaxseed		
	1946	1947	Jan.-May 1948	1946	1947	Jan.-May 1948
	1000 pounds	1000 pounds	1000 pounds	1000 bushels	1000 bushels	1000 bushels
British West Indies	730	1,180	1,289	a/	a/	-
British Honduras	-	36	16	-	-	-
Dominican Republic	-	-	4	-	-	-
El Salvador	-	-	12	-	-	-
French West Indies	126	18	-	-	-	-
Guatemala	-	-	6	-	-	-
Netherlands West Indies	-	-	105	-	-	-
Newfoundland	550	513	371	a/	a/	-
Panama	18	-	4	-	-	-
United States	11,413	5,774	3,432	18	37	476
South America	135	-	242	1	-	-
Belgium	3,495	-	-	-	55	-
Czechoslovakia	-	531	-	-	-	-
Eire	-	-	-	-	-	a/
France	1,738	838	-	13	3	3
Germany	-	-	551	-	-	-
Greece	108	-	-	-	-	-
Netherlands	387	-	3,455	-	-	-
Norway	-	225	-	-	-	354
Portugal	-	-	180	-	-	-
Soviet Union	54	-	-	-	-	-
Switzerland	-	-	1,136	-	2	-
United Kingdom	2,297	1,297	1,367	1	98	213
Asia	-	-	332	-	-	-
Union of South Africa	-	-	1,923	-	-	-
Other Africa	369	99	149	-	1	-
New Zealand	-	1,874	921	-	-	-
Total	21,420	12,385	15,495	33	196	1,046

a/ Less than 500 bushels.

Compiled from Trade of Canada.

RUMANIAN OILSEED PLANTINGS NORMAL

At the completion of the spring sowing, as of May 22, 1948, Rumanian oilseed acreage was reported as being normal in comparison with past years despite the fact that the planting plan was not fulfilled. Acreage for sunflower seed, by far the most important oil-bearing crop, amounted to 1,151,600 acres, a 15 percent decrease from the plan. Rapeseed was planted on 8,000 acres, flaxseed (for oil) 2,000, poppy seed 2,000, and soybeans only 121 acres.

CUBAN LARD AND TALLOW IMPORTS IRREGULAR

Cuban lard and tallow imports were irregular during the first 5 months of 1948 according to American Embassy reports, Habana. Ships manifests report the arrival of 13,000 short tons of lard compared with 15,000 during January-May of 1947. Because second quarter supplies were not available until April 20, only 14 percent of the period's allocation was imported in that month. In May 4,620 tons, or 61 percent arrived, leaving 25 percent to be imported in June.

The irregularity of receipts, combined with the scarcity of reserve stocks, caused severe shortages in the months of January and April. January and April receipts of tallow were also unusually small, while the largest arrivals, in February and May, followed issuance of United States quarterly export licenses. January-May imports of tallow totaled 4,993 tons compared with 4,268 for the same months of 1947.

The shortage of lard in the current year, with acute crises in January and April, stimulated hog slaughter to help supply the Cuban need for fats. Marketings of cattle during the last few months have been very small due to seasonally dry pastures. Although high tallow prices have encouraged careful trimming of beef carcasses, the recovery of tallow decreased from an average of 500 tons toward the end of 1947 to only 425 in recent months. In May soap manufacturers were able to purchase only 350 tons of this scarce raw material.

Cuban consumption of lard would probably average over 3,500 tons per month during the sugar-grinding season if this quantity were available. Imported and locally produced supplies together have not been large enough to fill requirements, and effective demand has been limited by the high retail prices of this period of shortages. On the basis of the quantities of lard available, disappearance of lard probably has averaged about 3,000 tons a month during January-May 1948.

Soap producers have been using nearly 1,500 tons of tallow per month. During April much of this was from their small stocks, and all the industry would use more if it could be secured. Many of the soap makers have preferred to accept poor grades of local tallow rather than to restrict operations or close their plants.

Cuban lard stocks, which were estimated at 2,400 tons on March 1, have fluctuated as widely as imports. Unusually small imports in April caused stocks to be exhausted so rapidly that by May 1 Cuba had less than 15 days' supply on hand. Estimates placed stocks as of the middle of June at 2,500 tons. Large May imports raised tallow stocks from levels (less than two weeks' supply) which threatened to close down soap plants to about 1,300 tons on June 1.

Lard imported into Cuba by the larger packers during the past three months has cost about 27 cents per pound c.i.f. Habana. The wholesale price of this lard is 30 to 31 cents and the legal retail price is 37 cents. Prices actually paid by consumers, however, have averaged closer to 60 cents a pound, and in April reached levels near 80 cents. Inadequate and fluctuating supplies and the seasonally high purchasing power of laborers are mainly responsible for the wide spread in prices.

CUBA: Lard and tallow imports, January-May 1948 with comparisons

Commodity and country	1947	January-May 1947 a/	January-May 1948 a/
	Short tons	Short tons	Short tons
Lard			
United States	39,873	-	-
Honduras	2	-	-
Total	39,875	15,495	13,189
Tallow			
United States	10,441	-	-
Argentina	25	-	-
Uruguay	135	-	-
Total	10,601	4,268	4,993

a/ Country breakdown not reported.
American Embassy, Habana.

Exceptionally high prices continue for Cuban tallow as a result of competitive bidding by large local soap makers. The latter currently pay from 45 to 50 cents a pound locally, while the insufficient supply available from the United States costs about 17 cents c.i.f. Habana. Tallow from Argentina and Uruguay costs 28 to 30 cents per pound c.i.f. Habana.

ARGENTINE LARD EXPORTS

The following table shows Argentine lard exports for May 1948 with comparisons:

ARGENTINA: Lard exports, May 1948 with comparisons.
(Gross weight)

Country and destination	Average: 1935-39	1947	January-May 1947	January-May 1948 a/	May 1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
North America:					
Netherlands West Indies	--	583	583	1	-
Others	--	141	141	-	-
Total	--	724	724	1	-
South America	685	3,283	2,751	25	-
Europe:					
Hungary	--	2,389	2,389	446	-
Italy	127	4,234	2,595	-	-
United Kingdom	6,673	3,821	3,026	2,582	1,675
Others	919	585	215	141	-
Total	7,719	11,029	8,225	3,169	1,675
Others	163	157	156	-	-
Grand total	8,567	15,193	11,856	3,195	1,675

a/ Preliminary.
Compiled from official sources and consular reports.

ARGENTINE TALLOW AND CATTLE-FAT EXPORTS

The following table shows Argentine tallow and cattle-fat exports for May 1948 with comparisons:

ARGENTINA: Tallow and cattle-fat exports,
May 1948 with comparisons
(Gross weight)

Country of destination	Average 1935-39	1947	January-May 1947	January-May 1948 a/	May 1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
North America:					
Canada	7	-	-	6,380	-
Cuba	377	15	-	1,767	-
Mexico	11	659	656	-	-
Others	9,935	799	455	249	20
Total	10,330	1,473	1,111	8,396	20
South America	1,914	4,807	3,152	1,179	129
Europe:					
Belgium	2,974	1,596	926	468	-
France	937	1,238	840	3,886	-
Italy	2,082	3,481	786	13	-
Netherlands	7,875	2,988	2,625	553	-
Sweden	1,695	2,513	2,513	-	-
Switzerland	1,133	1,202	434	481	-
United Kingdom	17,903	19,374	2,381	9,461	5,485
Others	18,063	10,904	1,823	1,709	-
Total	52,662	43,296	12,328	16,571	5,485
China	102	72	67	-	-
Soviet Union	-	4,508	4,508	-	-
Others	232	589	233	646	-
Grand total	65,240	54,745	21,399	26,792	5,634

a/ Preliminary.
Compiled from official sources and consular reports.

COTTON AND OTHER FIBER

(Continued from Page 84)

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the U.S. gulf-port average

Market location kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	7-29	99.05 lbs.	Tallari	77.00	64.25
Ashmouni, F.G.F.	"	"	"	(not	quoted)
Karnak, Good	"	"	"	109.00	90.95
Karnak, F.G.F.	"	"	"	(not	quoted)
Bombay		Candy			
Jarila, Fine	7-28	784 lbs.	Rupee	680.00	26.17
Broach, Fine	"	"	"	830.00	31.94
Kampala, East African	"	"	"	(not available)	
Karachi		Maund			
4F Punjab, S.G., Fine	7-29	82.28 lbs.	"	87.00	31.90
289F Sind, S.G., Fine	"	"	"	96.00	35.20
289F Punjab, S.G., Fine	"	"	"	111.00	40.70
Buenos Aires		Metric ton			
Type B	7-29	2204.6 lbs.	Peso	1/ 3160.00	42.68
Lima		Sp. quintal			
Tanguis, Type 5		101.4 lbs.	Sol		
Pima, Type 1		"	"		
Recife		Arroba			
Mata, Type 4	7-29	33.07 lbs.	Cruzeiro	170.00	27.97
Sertao, Type 4	"	"	"	180.00	29.61
Sao Paulo					
Sao Paulo, Type 5	"	"	"	189.00	31.09
Torreon		Sp. quintal			
Middling, 15/16"		101.4 lbs.	Peso		
Houston-Galveston-New Orleans av. Mid. 15/16"	"	Pound	Cent	XXXXXX	32.37

Quotations of foreign markets reported by cable. U.S. quotations from designated spot markets.

1/ Nominal.

COTTON CONSUMPTION IN CANADA SLIGHTLY DOWN

Consumption of cotton in Canada during the 8 months ended March 31, 1948, totaled 240,000 bales (of 500 pounds gross) compared with 246,000 bales for a similar period a year ago. Despite numerous complaints concerning rising costs, labor shortages, and the possibility that Japanese goods may soon be offered on the Canadian market, Canadian mills are expected to maintain a fairly steady rate of consumption through the summer months.

Imports of cotton during the 8 months ended March 31, 1948, totaled 245,000 bales, including 114,000 from the United States, 97,000 from Mexico, 29,000 from Brazil, 3,000 from Egypt, and 2,000 from India. Figures fro a comparable period in 1946-47 show a total of 255,000 bales including 229,000 from the United States, 8,000 from Brazil, 15,000 from Mexico, and 3,000 from India.

LATE NEWS

(Continued from Page 76)

last half of the month. The first half of July, 68 millimeters (2.7 inches) of rainfall compared with normal of 35 millimeters (1.4 inches).

Hay and pasture are giving good yields, but quality of the former is less than fair because of wet weather. Twenty percent of hay is still in the field, two and three weeks after cutting. Milk production is holding up well, about 20 percent over last year, which was the main reason for derationing milk July 1st.

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The Government of India is reported to have canceled export licenses for Indian Cotton not shipped or declared for shipment on May 31, 1948.